

THE INFLUENCE OF DESTINATION ATTRACTIVENESS AND VISITOR SEGMENTATION ON HOLISTIC AND CONATIVE OUTCOMES

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**UNIVERSITI SAINS MALAYSIA
2019**

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ATTRACTIVENESS AND VISITOR
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by

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**Thesis submitted in fulfilment of the requirements
for the degree of
Doctor of Philosophy**

August 2019

ACKNOWLEDGEMENT

My joyful experience in this academic journey is parallel to the thrill, many an adventurous respondent of this National Park research would have received from traversing mountains and basking in natural beauty. For me, this thrill is due to traversing different research terrains and gaining knowledge attributed mainly to having a supervisor like Professor T. Ramayah, with his vast expertise in research and analysis, and his generosity in imparting this knowledge to me. His guidance on materials for good methodology and his immediate feedback at any time of the day eased the process of completing this research tremendously. I am also grateful to Dr. Teh Sin Yin, for her thoroughness in examining my thesis during the proposal stage. I also truly appreciate my external examiner, Prof. Madya Dr. Rosmini Omar and my internal examiners Dr. Teh Sin Yin and Prof. Madya Dr. Shankar Chelliah for their thoroughness in reading my thesis and providing feedback to improve the quality of the thesis.

This journey too would not have been possible if it was not for the blessings of my wonderful parents and brother, whose unconditional love and continuous emotional and financial support assisted me when facing challenges throughout this research process. The completion of this thesis would also not have been possible if not for the expertise of my friends, the computer whiz, Viswa, and the translation expert Jaja. Finally, my sincere appreciation to my course mates, Devi Sakti and Liling for their support and my bosom buddies, the kindred spirits in my life, Sumitha, Tamara, Premala, Sor Wah, Anita and Rani, who were always there for companionship and emotional support.

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PENGARUH DAYA TARIKAN DESTINASI DAN SEGMENTASI PELAWAT KE ATAS HASIL HOLISTIK DAN KONATIF

ABSTRAK

Permintaan untuk pelancongan berasaskan alam semulajadi menunjukkan kepentingan sektor ini kepada Malaysia, sebagai negara yang kaya dengan kepelbagaian biologi. Cabaran yang dihadapi adalah mengenai bagaimana untuk merangkumi pelancongan massa tetapi masih menjana pendapatan. Masalah ini dapat diatasi dengan meningkatkan kualiti tarikan dan meneliti pengaruh segmen pelawat. Objektif penyelidikan ini adalah untuk menilai pengaruh daya tarikan destinasi ke atas hasil seperti pengaruh fungsi tarikan utama, fungsi tarikan sokongan, tarikan psikologi, dan tarikan unik ke atas hasil holistik dan konatif dengan kategori afektif berkhidmat sebagai mediator. Objektif kedua adalah untuk membanding tarikan dari segi kepentingan dan prestasi. Objektif ketiga adalah untuk mengkaji pengaruh daya tarikan ke atas hasil berdasarkan segmen pelawat seperti motivasi perjalanan, kebiasaan terhadap destinasi berasaskan alam semulajadi dan keserupaan budaya dengan negara tuan rumah. Soal selidik diedarkan kepada 522 pelawat dari Taman Negara Pahang, Taman Negara Kinabalu and Taman Negara Mulu. Data kuantitatif dan kualitatif dikumpulkan dan dianalisis dengan menggunakan statistik grafik dan deskriptif, ujian bivariate dan teknik PLS-SEM. Hasil kajian menunjukkan bahawa semua daya tarikan kognitif kecuali dalam daya tarikan berfungsi sokongan, mempunyai pengaruh positif ke atas hasil dengan kategori afektif berkhidmat sebagai mediator. Motivasi dibahagikan kepada tiga kategori iaitu kategori pembelajaran, kategori pengembaraan dan kategori sosialisasi. Hasil penyelidikan menunjukkan

bahawa motivasi yang keserasian dengan daya tarikan di taman negara akan membawa kepada pengaruh positif ke atas hasil holistik dan konatif. Untuk pembolehubah kebiasaan dengan destinasi berasaskan alam semulajadi, didapati bahawa pelancong yang lebih biasa dengan destinasi alam semulajadi akan member keutamaan kepada daya tarikan fungsi utama destinasi tetapi pelancong yang kurang berpengalaman akan memberi keutamaan kepada aspek psikologi. Untuk pembolehubah keserupaan budaya, didapati pelawat yang datang dari negara dimana kurang orang berpengalaman dengan Malaysia, akan memberi keutamaan kepada aspek psikologi. Didapati juga bahawa jika pelawat tarik dengan Malaysia kerana biasa dengan budaya Malaysia dan tarik kepada aspek novel Malaysia, ini akan memberi kesan positif kepada daya tarikan Taman Negara. Sumbangan kajian ini kepada teori adalah untuk meninjau daya tarikan destinasi secara komprehensif, untuk membanding kepentingan dan prestasi daya tarikan destinasi dan untuk dengan lebih tepat menentukan kriteria segmentasi dan mengkaji pengaruh segmentasi ke atas daya tarikan dan hasil. Sumbangan praktikal, batasan dan cadangan untuk penyelidikan selanjutnya diberikan berdasarkan hasil kajian ini.

THE INFLUENCE OF DESTINATION ATTRACTIVENESS AND VISITOR SEGMENTATION ON HOLISTIC AND CONATIVE OUTCOMES

ABSTRACT

The demand for nature-based tourism globally, highlights the importance of this sector for Malaysia, being a country rich in biodiversity. The challenge faced though is on how to contain mass tourism but still generate revenue. This problem can be overcome by improving the quality of the attractions and examining the influence of visitor segmentation. The objective of this research is to evaluate the influence of destination attractiveness constructs such as core functional attractions, supporting functional attractions, core and supporting psychological constructs and the unique construct on holistic and conative outcomes via the mediating effect of the affective construct. Another objective is to compare the importance of the destination attractiveness constructs with the performance of the constructs in influencing holistic and conative outcomes. The final objective is to identify visitor segmentation criteria and examine the influences of destination attractiveness on holistic and conative outcomes by visitor segmentation. The visitor segmentation constructs are such as travel motivation, familiarity towards nature-based destinations and country-level familiarity plus individual-level attraction towards Malaysia. Questionnaires were distributed to 522 visitors of Taman Negara Pahang, Kinabalu National Park and Mulu National Park. Quantitative and qualitative data were collected and analyzed using graphical and descriptive statistics, bivariate tests and multivariate Partial Least Squares Structural Equation Modelling (PLS-SEM). The results show that all cognitive destination attractiveness constructs except for the functional

supporting construct have a positive influence on the holistic and conative outcomes with the affective construct serving as a mediator. In terms of visitor segmentation constructs, the travel motivation, which is divided into three constructs of growth and learning, adventure and novelty and socialization and health depicts that congruence between motivation constructs and destination attractiveness constructs have a positive influence on holistic and conative outcomes. For familiarity with nature-based destinations, the more experienced a person is in terms of frequency and age of visitation of National Parks, the stronger the effect of core functional constructs on holistic and conative outcomes. The less experienced the person is, the stronger the effect of psychological constructs on holistic and conative outcomes. Familiarity derived from WOM also has a positive influence on destination attractiveness and outcomes. In terms of cultural proximity, both country-level familiarity and individual level attraction affect destination attractiveness. Findings on country-level familiarity depict that tourists from countries that are less familiar with Malaysia will place more importance on psychological constructs in the destination attractiveness-outcome relationship. The study also finds that individual-level attractions, which consist of novelty and familiarly aspects, have a stronger influence on destination attractiveness as compared to country-level familiarity. This study contributes to theories of destination attractiveness by comprehensively examining destination attractiveness, by incorporating the importance and performance measures and by adopting a more precise method of determining the segmentation criteria together with their influences. Practical contributions limitations and future recommendations are provided based on the results.

CHAPTER 1

INTRODUCTION

1.0 Introduction

In some places of the world, the earth is always laughing, enchanted by the natural beauty of the land as in its forest, sea, mountains, wildlife and others. Malaysia, the subject of this thesis, is one of the beneficiaries of nature's beautiful inheritance. Malaysia consists of Peninsular Malaysia and East Malaysia, which is Sabah and Sarawak. Situated at the crossroads of Southeast Asia, Malaysia ranks high as a haven for nature enthusiasts with its vast natural resources (Malaysia's Wildlife and Nature, 2014; Malaysia Traveller, 2019; WWF Malaysia, 2019). The diverse species of orchids at Kinabalu Park in Sabah, birds from Peninsular Malaysia, ferns in the whole of Malaysia, mammals in Peninsular Malaysia and other species in East Malaysia are all testament to the beauty awaiting the visitors of nature sites in Malaysia (Malaysia's Wildlife and Nature, 2014; Malaysia Traveller, 2019; WWF Malaysia, 2019) .

Many National Parks in Malaysia have evolved to becoming a natural wonderland, attracting an unending tidal wave of tourists. Although growth in tourism is welcomed, mass tourism to protected sites such as National Parks, pose a challenge to upholding the sustainability of National Parks. The Malaysian government's goal for National Parks currently is to reduce the number of tourists in overcrowded National Parks while simultaneously increasing revenue.

The juxtaposition of these two paradoxical ideal goals can only be achieved if the implementations of specific strategies put in place by the Malaysian government, such as zoning, niche tourism and promotional strategies (Saufi, Andilolo, Othman, & Lew, 2017; Tourism Malaysia, 2013a) are a success. These strategies deal with the

concentration of activities to only designated areas of the National Park, the creation of nature trails consisting of a few nature destinations packaged together, generation of special events for specific groups of niche tourists, promotional strategies attracting different tourist segments and others. The aim is to not only efficiently utilise natural resources and preserve the environment at the National Parks but also to satisfy different segments of nature tourists.

Taking a sample of three important National Parks in Malaysia, which are Taman Negara Pahang (TNP), Kinabalu National Park (KNP) and Mulu National Park (MNP), this study will investigate issues such as perceived destination attractiveness of the National Parks and visitor segmentation. The sample National Parks are selected based on the fact that they are World Heritage and potential World Heritage sites, they are forest-based National Parks, and they attract a sufficient number of domestic and international tourists. The findings will assist in evaluating the effectiveness of government strategies towards nature-based tourism. Apart from the study being of practical relevance to the Malaysian National Park authorities in their marketing efforts, this study also tackles a lacuna in theory by grounding segmentation issues in nature-based tourism into a comprehensive destination attractiveness framework. On that account, this Chapter will illustrate the tourism context and problem statement that ignite the need for this research, the objectives of the research and finally, the theoretical and practical contributions of the research.

1.1 Background of the Study

This section on research background discusses the background information related to tourism in general, tourism to National Parks, National Parks in Malaysia, the competitive environment faced by national parks and information about the

importance of destination attractiveness and segmentation constructs used in the research.

1.1.1 The Significance of Tourism to Malaysia

The emergence of technology, a burgeoning middle class, and accessibility of affordable airlines have created a flatter world, a term coined by Friedman (2007). The globalisation phenomenon has thus spilt over to the travel industry as well. Boundaries have been eroded, and people are no longer tied by the fetters of travelling only within their country. Travelling overseas, which used to be the luxury of the rich, is now frequented by more people. All this indicates an increase in demand for global tourism with Malaysia and other Asia Pacific countries not exempted from this phenomena as well. The figures in the next paragraph will attest to this.

The United Nations World Tourism Organisation (UNWTO) published that in 2018, the trend in international tourism arrivals continued to increase with 2018 hitting the second-highest growth since 2010 (UNWTO, 2019). Some of the reasons for this growth is due to economic growth and improved connectivity due to improvement in transportation and technology. The growth in international tourism arrivals was also noted in the Asia-Pacific Region, the region where Malaysia is located, with an average of 6%, a value on par with the world average. This region depicts one of the highest growth rates after the Middle East (10%) and African (7%) regions. For further evidence on the growth in the Asia Pacific region, the UNWTO (2019) report also reports that the Asia Pacific region achieved a high of 30% in world tourism receipts in 2017.

UNWTO (2017) records that in 2017 Malaysia was among the prime destinations in the Asia Pacific region, with a ranking of 4rd in terms of tourism arrivals (26 million) after countries in the North-East region such as China (60.7 million), Hong Kong (27.8 million) and a country in South East Asia which is Thailand (35.4 million). Malaysia also falls under the category of top outbound markets together with other Asia Pacific countries such as China, India, Australia, Thailand, Indonesia, Singapore and Vietnam. The high growth in tourism arrivals is also because the markets that are recorded as top outward bound markets are also markets highlighted as Malaysia's top tourism receipts (New Straits Times, 2019; Tourism Malaysia, 2014; UNWTO, 2017).

A reason why the Asia Pacific region has the potential to grow in terms of tourism is that it has capitalised on the technology revolution and improved its transportation and digital communications (UNWTO, 2017). The competitiveness of Malaysia's tourism is also supported by the fact that Malaysia was ranked 26th in the Travel and Tourism Competitiveness Report by the World Economic Forum (WEF) (Dass, 2017). Some further supporting information to depict the popularity of Malaysia as a tourism destination is that it is ranked the 10th most visited place in the world and Lonely Planet ranked Malaysia as one of the top 10 must-visit global destinations in 2014. The top 10 magazines also listed Malaysia as the desired stop to explore (Ayob & Masron, 2014). Hence, the contribution of Malaysia to the Malaysian economy is high. For example, it can also be seen that the contribution of tourism to the Malaysian economy had increased from 2018 to 2019, In 2019, the contribution of tourism was RM84.1 billion, which is an increase of 2.4% from 2018 (New Straits Times, 2019).

1.1.2 Challenges Faced by Nature-Based Destinations

Nature-based tourism faces the challenge on how to deal with two paradoxical objectives, which is to contain mass tourism and still generate employment and revenue. Mass tourism has positive effects regarding revenue but can also create problems associated with mass tourism.

Mass tourism to National Parks in Malaysia has created detrimental effects such as littering, erosion of trails, damage of facilities, insufficient water, behaviour that disrupts the lives of the indigenous people and other factors (Ibrahim & Hassan, 2011; Jaafar, Ismail, & Rasoolimanesh, 2015; Tay & Chan, 2014; Tourism Malaysia, 2013a). Mass tourism is also due to seasonal demands created by climate conditions which force facilities at National Parks to operate only at certain times of the year. Therefore, during specific peak periods, seekers of solitude, hoping to escape the hassle and bustle of the city, will be beset by congestion, thus reducing the attractiveness of the National Parks.

Another challenge to the attractiveness of the National Parks is the inability to view large mammals due to the density of the forest (Tourism Malaysia, 2013a). For some, whose primary motive to go to the National Parks is for this purpose, their hopes of a thrilling wildlife experience may be hampered. Experienced tourists, especially those who have felt the thrill of exotic wildlife in places such as at the African Safari or Indian Parks, may make comparisons and be disappointed. These issues highlight the challenges of disseminating information well so that visitors will not have unrealistic expectations. The other challenge is to create realistic wildlife experiences such as bird watching and identification of elephant footprints.

Thus, Tourism Malaysia (2013a) suggested attracting more domestic tourists, as foreign tourists may find Malaysian parks a poor substitution as

compared to these other National Parks. Another rationale which was given by Tourism Malaysia (2013a) for this is that Malaysian foreign tourism market is dominated by the Asian market, and this market is less likely to indulge in nature tourism compared to the western tourism market. Though domestic tourism is encouraged to lessen competition, the challenge is also to maintain a sufficient flow of foreign tourists as they are the ones who will fetch high yield whereby attracting high yield tourists is the impetus to the development of National Parks. The adverse outcome of this is that tapping into the high-yield market still proves as a challenge to nature-based tourism in Malaysia (Tourism Malaysia, 2013a).

Another challenge is on how to create an environment whereby nature-based tourism will be considered a profitable venture for business operators so that they will stay long in this industry and invest in it. Jaafar, Kayat, Tangit, and Yacob (2013) also mentions the challenge of preventing unsuitable activities promoted by tour operators to gain profit. Some examples are such as encouraging the feeding of monkeys resulting in the monkeys turning aggressive or indulging in activities that offend the indigenous people (Jaafar et al., 2013).

The above discussion hints that there are conflicting objectives among stakeholders, which create a challenge in coordinating the different interest groups (Tourism Malaysia, 2013a). The interest groups are such as the government, whose sole interest is in the environment, economy and employment of the community. Then, there are the business operators, who are operating for profit, the tourists, who are interested in maximising their satisfaction towards the nature experience and the community in that area, who are interested in employment from nature-based tourism (Ibrahim & Hassan, 2011; Jaafar et al., 2013; Tay & Chan, 2014; Tourism Malaysia, 2013a).

Due to conflicting interests, the responsibility of training and other management issues also becomes a problematic issue for National Parks. Training is essential, especially to have better-skilled tour guides from the community. Many of the studies on Malaysian National Parks have shown that although many of the indigenous people are knowledgeable about flora and fauna at the National Parks but they face language difficulty, especially in speaking English to foreigners (King, Nair, Mohamed, & Bahauddin, 2013; Tangit, Hasim, & Adanan, 2014; Tourism Malaysia, 2013a).

1.1.3 Malaysian National Parks (NPs)

Malaysia is acclaimed to be a haven for nature tourists with its array of biodiversity and flagship species, especially at the East Coast of Malaysia (Perhilitan, 2019; Sarawak Forestry Corporation, 2019; The Sabah Parks, 2019). This notion can be supported by the fact that Malaysia has more than 50 NPs and nature reserves (Malaysia's Wildlife and Nature, 2014). Figures 1.1, 1.2 and 1.3 present visitor statistics for the main NPs in Peninsular Malaysia, Sabah and Sarawak. The NPs can be divided into forest-based and marine-based NPs. In Peninsular Malaysia and Sarawak, most of the NPs are forest-based but in Sabah, the popular NPs are of both forest-based and marine-based NPs.

The 2017 annual report of the Department of Wildlife and National Parks (Perhilitan), the institution in charge of NPs in Peninsular Malaysia, depicts two NPs to be popular among domestic and international visitors (Perhilitan, 2017). They are Penang NP and Pahang NP, Kuala Tahan. Both NPs receive sufficiently large and approximately equal numbers of domestic and international tourists. Pahang NP,

Kuala Tahan, which will be referred to in this study as Taman Negara Pahang (TNP), stands out due to its distinct characteristics, as stated in Figure 1.1.

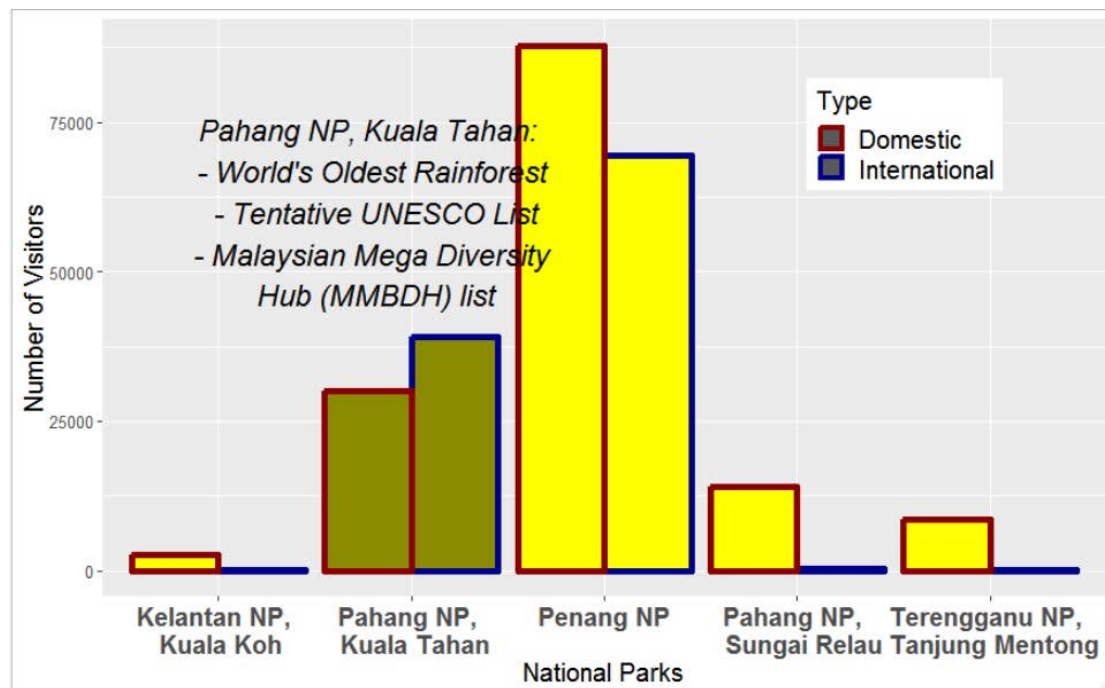


Figure 1.1: Main NPs in Peninsular Malaysia (forest-based) – 2017 visitor statistics

Source: Perhilitan (2017), UNESCO World Heritage Centre (2019), Tourism Malaysia (2013a)

The main National Parks for Sabah is presented in Figure 1.2. Sabah consists of many prominent forest-based NPs such as Kinabalu National Park (KNP) as well as marine-based parks such as Sipadan NP and Tunku Abdul Rahman NP. The visitor statistics are based only on the 2010 annual report as that is the only updated record on all the National Parks in Sabah. Though this is the case, news reports from Lee (2018) and Star Online Metro News (2017) show that the trend is the same even in 2017 with the same NPs dominating the tourism market. For example, Lee (2018) reports that tourism to KNP is gaining popularity every year, with a total visitor arrival of 304905 in 2017. In Star Online Metro News (2017), it is also stated that NPs such as Sipadan and KNP are very popular among domestic and international

tourists. These NPs have received international recognition with KNP having distinct characteristics such as stated in Figure 1.2.

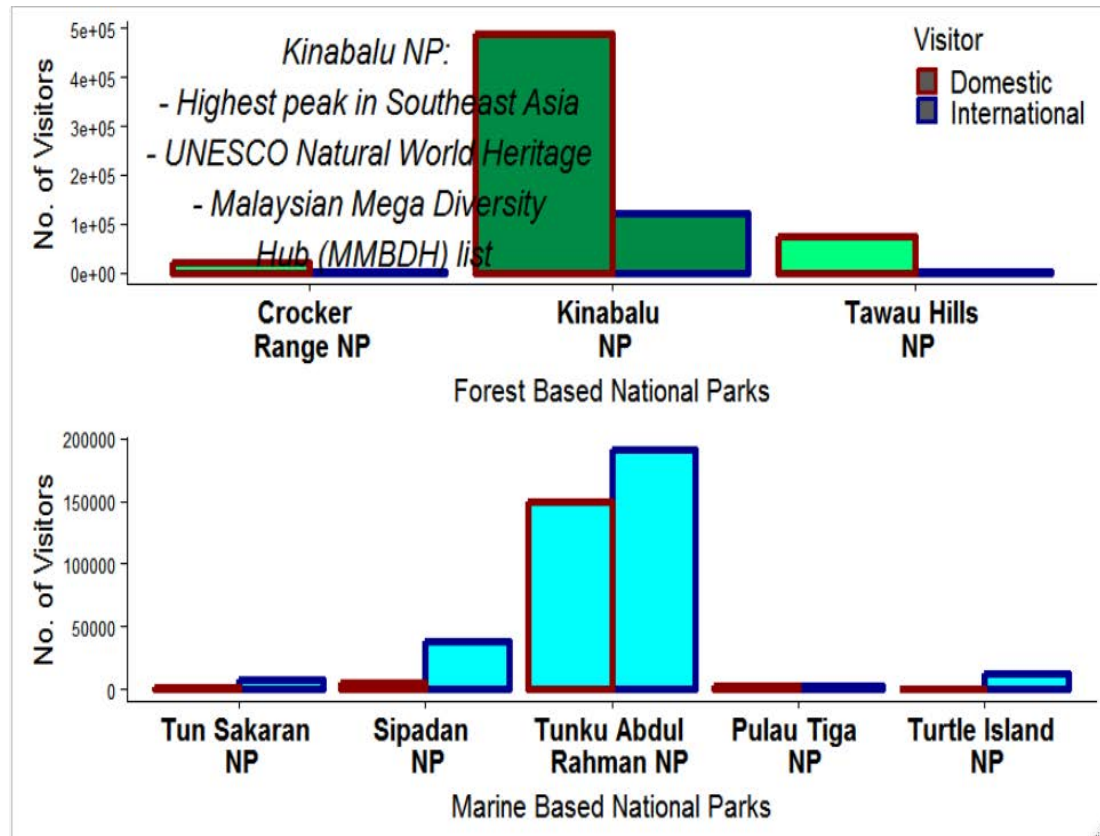


Figure 1.2: Main NPs in Sabah (forest and marine-based) – 2010 visitor statistics

Source: Sabah Parks (2010), UNESCO World Heritage Centre (2019), Tourism Malaysia (2013a)

In Sarawak, Figure 1.3 shows that the main NPs are forest-based, which are mainly situated in Kuching and Miri. In Kuching, Bako NP is popular, especially among international tourists. In Miri, Mulu NP (MNP), frequented by more international tourists and Niah NP, visited by mainly domestic tourists, are the well-known NPs. Of these, the NP internationally recognised is MNP, with distinct characteristics, as stated in Figure 1.3.

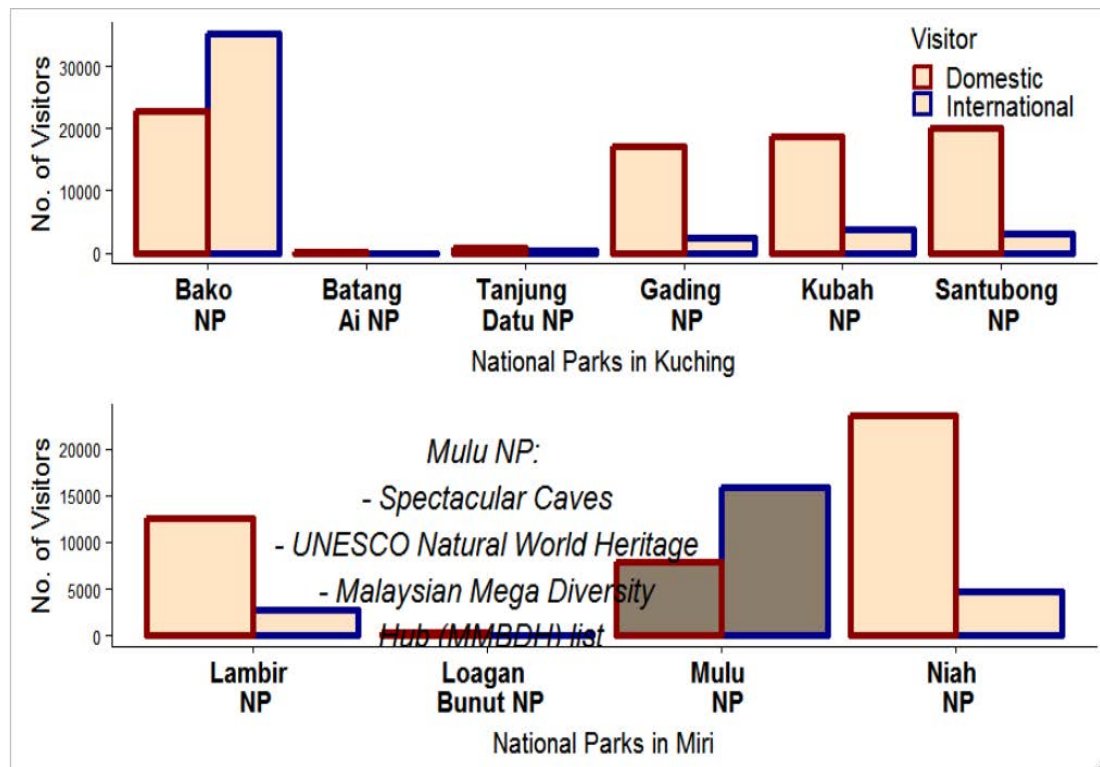


Figure 1.3: Main forest-based NPs in Sarawak - 2017 visitor statistics

Source: Sarawak Forestry Corporation (2019), UNESCO World Heritage Centre (2019), Tourism Malaysia (2013a)

Other than these world recognised natural sites, flagship flora and fauna species at prominent NPs also add an intriguing atmosphere that attracts visitors to the destination. Examples of these in other countries are such as India's Bengal Tigers, Australia's Kangaroo and Koala's, Nairobi's Gorillas, China's Pandas and others. Malaysia, in turn, has its exotic flagship species such as the Orang Utan, the Leatherback turtles, the Sang Kancil, the hornbills and others, which are mainly housed in many of the NPs in Malaysia. It is no surprise, therefore, that Malaysia has won many accolades for its biodiversity, such as being ranked 12th in world mega biodiversity standing (Tourism Malaysia, 2013a).

Based on the abundant presence of biodiversity in Malaysia as described earlier, Malaysia's National Park would be a feast of beauty, one which nature

enthusiasts may be willing to pay more to experience, contingent on the ability to preserve this beauty. The above information reveals that Malaysian NPs such as TNP, KNP and MNP, with their popularity among domestic and international tourists, their internationally recognised World Heritage and tentative World Heritage status and their distinct characteristics all serve as prominent nature-based tourism sites in Malaysia and their potential to attract tourists begs further investigation.

1.1.4 Linking the Overall Profile of Malaysian Tourists with the Specific Profile of Visitors to National Parks in Malaysia

As shown in Table 1.1, except for the United Kingdom, most of the tourism receipts from Malaysia come from Asian and Oceanic regions (New Straits Times, 2019; Tourism Malaysia, 2013b, 2014). The high spending tourists, however, are mostly from the Middle East. If we relate the activities of these tourists, to nature-based tourism, specifically to forest-based destinations, which is the scope of this study, we can find that most of these tourists do not engage in hiking and trekking, the main activities at the sample destinations. The principal activities of these tourists to Malaysia are mainly to attractions in the city, shopping, and visiting beaches (Tourism Malaysia, 2014).

Tourism Malaysia (2013a) and Tourism Malaysia (2014) also show that most of the foreign tourists to three important National Parks in Malaysia are from the European region, which varies from the visitor profile of tourists frequenting Malaysia or those spending a lot in Malaysia. This scenario indicates that forest-related nature-based destinations, fail to attract foreign tourists who have closer cultural proximity with Malaysia, that is, those closely related due to the distance

between the countries, such as from Asian countries and those related due to language and religion such as from the Middle East countries.

TNP is shown to have an equivalent proportion of Malaysians and Europeans, KNP, a wide range of nationalities with fewer Malaysians as compared to TNP and MNP with the highest percentage of Europeans. TNP depicts the least amount spent by tourists and MNP and KNP show on average, higher amounts spent by tourists. For all three National Parks, Malaysian visitors spend the least amount of money while Europeans, the primary type of visitor for all three parks, spend a significant amount of money.

Though tourists from countries in the Asian, Oceania and also the Middle East currently are not key contributors to the revenue of National Parks, their importance should not be dismissed as according to Ayob and Masron (2014), some tourists from these regions are the top nationalities for tourism receipts to Malaysia in 2013/2014. For example, tourists from Singapore, Indonesia, China, Brunei, Australia, India, Thailand, the Philippines, and Japan. The only European country among the top receipt nationalities is the United Kingdom. The next section on the problem definition will, therefore, relate the contextual situation explained in this Chapter to the research needs of this study.

Table 1.1 Linking visitor composition to Malaysia with visitors to three important National Parks

Top ten receipts to Malaysia in 2014						
Country of origin	Receipts (RM million)	Average Length of Stay	Major activities			
			Sightseeing in cities (%)	Shopping (%)	Hiking / Trekking (%)	Visiting Beaches (%)
Singapore	31774.10	4.3	67.5	60.1	28.4	29.8
Indonesia	6694.70	7.5	80.2	54.3	19.1	14.8
China	4940.30	6	85.1	58	44	48.4
Brunei	2898.00	3.6	73.6	68.3	16.5	NA
Australia	2464.90	8.7	79	41.2	39.1	41
India	2284.40	6.8	77.2	50.5	37.5	30.9
Thailand	2250.30	6.4	88.5	62.2	50.4	44.6
United Kingdom	1859.70	9.7	83.6	43	41	42
Philippines	1790.20	6.1	83.9	60.7	37.9	40.6
Japan	1763.60	6.4	68.1	38	27.5	27.5

Top Ten Average Per Capita Expenditure in 2014						
Country of origin	Average Per Capita Expenditure (RM million)	Average Length of Stay	Major activities			
			Sightseeing in cities (%)	Shopping (%)	Hiking / Trekking (%)	Visiting Beaches (%)
Saudi Arabia	8819.1	8.8	88.9	67.0	22.6	44
Kuwait	8501.2	7.6	NA	NA	NA	NA
Oman	7538.3	8.3	NA	NA	NA	NA
UAE	7285.4	7.9	NA	NA	NA	NA
Iran	6562.8	8.0	95.5	66.9	16.9	14.4
Russia	4319	9.0	NA	NA	NA	NA
Ireland	4134	9.8	NA	NA	NA	NA
South Africa	4157.7	9.0	NA	NA	NA	NA
Italy	3513.5	8.7	NA	NA	NA	NA
United Kingdom	4227.6	9.7	83.6	43	41	42

Main Visitors to three important National Parks in 2013			
Country / Region (majority)	Sample National Parks		
	Taman Negara Pahang (TNP)	Kinabalu National Park (KNP)	Mulu National Park (MNP)
Europeans	45%	34%	51%
Malaysians	45%	32%	24%

Source: Tourism Malaysia (2014); Tourism Malaysia (2013b), New Straits Times (2019), Tourism Malaysia (2013a)

Note: NA represents not applicable

Table 1.2: Visitor characteristics of three important National Parks

Demographics	TNP		KNP		MNP	
Age (majority)	18-34 (65%)		18-34 (55%)		18-34 (54%)	
Average Length of Stay (days)	3		2-3		3	
Nationality (majority)	Europeans (45%) Malaysians (45%)		Europeans (34%) Malaysians (32%)		Europeans (51%) Malaysians (24%)	
Median spending on package (RM)	Malaysia	65	Malaysia	288	Malaysia	288
	Asia	233	255	ASEAN	ASEAN	380
	Europe	438	ASEAN	Asia	Asia	225
	Overall	69	690	America	America	206
			Asia	Oceania	Oceania	585
			325	Europe	Europe	331
			America	Overall	Overall	237
			724			
			Oceania			
			400			
			Europe			
			330			
			Overall			
			325			
Median spending of free independent travellers (RM)	Malaysia	126	Malaysia	92	Malaysia	200
	Asia	81	ASEAN	ASEAN	ASEAN	222
	West Asia	59	163	Asia	Asia	302
	America	212	Asia	West Asia	West Asia	436
	Europe	89	103	America	America	249
	Overall	93	Europe	Oceania	Oceania	212
			118	Europe	Europe	242
			Africa	Overall	Overall	235
			145			
			Overall			
			103			
Source of information for tourists	The Internet (main source), Friends and family, Travel guidebooks, Travel agency, Educational institutions					

Source: Tourism Malaysia (2013a)

1.1.5 Competitive Environment Faced by Malaysian National Parks

Competition regarding tourism can be divided into competition for tourists from long-haul destinations and competition for tourists from short-haul destinations. Long-haul tourism is harder to achieve as it is with well-established nature-based

destinations such as Costa Rica, Canada, America, the Caribbean, and others (Tourism Malaysia, 2013a).

Hence, it would be better for Malaysia to compete with short-haul destinations such as those in neighbouring countries (New Straits Times, 2019; Tourism Malaysia, 2013a). These countries will have similarity in culture or types of nature-based destinations. Some of the countries that prove to be competitors in terms of nature-based tourism are such as Thailand, Indonesia and Philippines, as mentioned in Tourism Malaysia (2013a). These countries also have tourists from similar nationalities visiting their country. The findings by Tourism Malaysia (2013a) shows that the tourists who visit all these countries are such as those from Malaysia, Singapore, China, India, Australia, United Kingdom and Japan.

Some comparative figures for the year 2012 are provided by Tourism Malaysia (2013a) to depict countries such as Thailand as close competitors with Malaysia. In terms of ranking of tourism arrivals, Malaysia surpassed Thailand by being 9th in the world as compared to Thailand, which had not fallen into the top 10 rankings. The number of tourists' arrivals for Malaysia in that year was 25.03 million and for Thailand, 19.1 million. UNWTO (2018) figures for 2017 portray similar findings except that Thailand had a higher international tourism arrival from Malaysia, that is 35.4 million, whereas Malaysia's tourism arrival was 25.9 million.

Though Malaysia recorded a high number of tourist arrivals, the figures did not translate to higher revenue. As shown in Tourism Malaysia (2013a), tourists to Malaysia did not spend as much as those to Thailand. Thailand ranked 11th with tourism receipts amounting to US\$26.3 billion whereas Malaysia's ranking was 14th with tourism receipts of US\$6 billion. In 2017, UNWTO (2018) recorded tourism receipt values of US\$18323 million for Malaysia and US\$57477 million for

Thailand. Tourism Malaysia (2013a) also shows that in 2012, Malaysia's average spending per visitor per trip was US\$745, whereas Thailand's was US\$1380. The fact that Thailand received higher earnings per visitor is also supported by estimates on length of stay by Tourism Malaysia (2013a) whereby average length of stay to Thailand was 10 nights and to Malaysia was 7 nights.

The performance of nature-based tourism of countries like Thailand is also much better as compared to Malaysia. Thailand boasts a strong nature-based tourism market, with more than 200 nature-based sites (Tourism Malaysia, 2013a). Tourism Malaysia (2013a) analysed that Thailand has a booming nature-based tourism market because their promotional initiatives, especially via the internet, are more visible as compared to Malaysia. Furthermore, Thailand also has a quality control body such as Green Leaf Foundation that monitor the quality of the nature-based destinations in the country. In Malaysia, the quality control body is the Malaysian Mega Biodiversity Hub (MMBH) initiative. With the introduction of this initiative and the numerous strategies stated above, it is believed that the approach of the Malaysian government to heighten spending, lengthen stay and alter the profile of visitors to improve the competitiveness of Malaysia's nature-based tourism in line with these other countries can be achieved.

As shown in Table 1.3, most of the countries in the same competitive environment with Malaysia where tourism is concerned, have many nature-based tourist sites that are listed or tentatively listed in the UNESCO Natural World Heritage list or are on the tentative list. This environment illustrates that in neighbouring countries and regions as well, there are many interesting nature-based sites to explore, and competition is, therefore, stiff.

Table 1.3: UNESCO World Heritage sites in Malaysia and other competing countries

Country	Listed Natural World Heritage Sites	Tentative Natural World Heritage Sites
Malaysia	<ul style="list-style-type: none"> • Gunung Mulu National Park (2000) • Kinabalu Park (2000) 	<ul style="list-style-type: none"> • National Park (Taman Negara) of Peninsular Malaysia (2014) • Royal Belum State Park (2017) • FRIM Selangor Forest Park (2017) • Gombak Selangor Quartz Ridge (2017)
Indonesia	<ul style="list-style-type: none"> • Komodo National Park (1991) • Lorentz National Park (1999) • Tropical Rainforest Heritage of Sumatra (2004) • Ujung Kulon National Park (1991) 	<ul style="list-style-type: none"> • Betung Kerihun National Park (Transborder Rainforest Heritage of Borneo) (2004) • Bunaken National Park (2005) • Raja Ampat Islands (2005) • Taka Bonerate National Park (2005) • Wakatobi National Park (2005) • Derawan Islands (2005)
Thailand	<ul style="list-style-type: none"> • Dong Phrayayen-Khao Yai Forest Complex (2005) • Thungyai-Huai Kha Khaeng Wildlife Sanctuaries (1991) 	<ul style="list-style-type: none"> • Phuphrabat Historical Park (2004) • Kaeng Krachan Forest Complex (KKFC) (2011) • Wat Phra Mahathat Woramahawihan, Nakhon Si Thammarat (2012)
Philippines	<ul style="list-style-type: none"> • Mount Hamiguitan Range Wildlife Sanctuary (2014) • Puerto-Princesa Subterranean River National Park (1999) • Tubbataha Reefs Natural Park (2009) 	<ul style="list-style-type: none"> • Batanes Protected landscapes and seascapes (1993) • The Tabon Cave Complex and all of Lipuun (2006) • Paleolithic Archaeological Sites in Cagayan Valley (2006) • Kabayan Mummy Burial Caves (2006) • Chocolate Hills Natural Monument (2006) • Mt. Malindang Range Natural Park (2006)

Sources: UNESCO World Heritage Centre (2019)

1.1.6 The Need for Evaluating Destination Attractiveness-Outcome Relationship

One of the main problems of National Parks is mass tourism, as mentioned in Tourism Malaysia (2013a). Inspection of the tourists' composition of three important National Parks, however, shows that tourists to these National Parks are not vital

tourists from neighbouring Asian countries who frequent Malaysia often or are from Middle Eastern countries who spend more in Malaysia. The tourists who visit these three National Parks are mainly from European countries (Ibrahim & Hassan, 2011; Jaafar et al., 2015; Tay & Chan, 2014; Tourism Malaysia, 2013a, 2014).

One of the strategies of park authorities to increase revenue is to offer nature-based products that are of value. Value can only be achieved if the activities, services, and facilities provided are of high quality, equivalent to the price proposed. It is expected that the quality of attractions may have improved due to government initiatives in recent years. For example, in 2013, Tourism Malaysia (2013a) stated that it plans, in 4 years to implement standards for quality, which will be called MyQual, to standardise the quality of nature-based destinations all over Malaysia (Tourism Malaysia, 2013a). When the quality is improved, especially on par with major competitors such as Thailand and Australia more of Malaysia's main tourist's arrivals such as from Asian, Oceanic regions, and other visitors will visit and spend a longer time. For nature-based tourism too, the core characteristics of nature should be given utmost priority. Part of the government's game plan (Tourism Malaysia, 2013a) and also part of the requirements of the heritage charter (UNESCO World Heritage Centre, 2008) is for National Parks to be used as a tool for research and learning about the environment. Hence, the core dimension should be perceived to be of high quality and worthy of research and education.

Past findings on Malaysian National Parks regarding value for money and quality have not been encouraging. For example, findings have shown that although some attractions and facilities of the three National Parks have been privatised together with the imposition of a higher price, the results have been more negative with tourists finding a mismatch between the price and quality (Tourism Malaysia,

2013a). The traits of nature-based tourism too are different from other destinations. For example, experienced nature lovers may not be looking for luxury and may not place importance on certain supporting facilities but may place more weight on core characteristics attributing to nature. Previous findings, however, show that the evaluation of the learning aspect and the nature guide's communication ability to pass on crucial knowledge about nature is lacking, which can serve as a deterrent, especially to experienced nature-based tourists. Finally, on competition, Malaysian National Parks face fierce competition from other more established National Parks such as in Thailand and Australia (Tourism Malaysia, 2013a).

The problems above show that there is a need to investigate the perceived attractiveness of the National Parks in detail. To investigate these aspects will enable the attractiveness factors that have a stronger influence on outcomes such as recommendation, repeat visitation to Malaysia and others to be identified and emphasised. With regards to being competitive, there is also a need for the Malaysian National Parks to highlight its unique characteristics. National Parks in Malaysia have many unique features, such as its flagship animals and culture of the indigenous people. It should be investigated whether these features are noticed by visitors to the parks and whether they help to increase the competitive nature of the park. This investigation is necessary as the National Parks are also the pride of a nation and flagship unique features at National Parks also serve to be national icons boosting the image of the country.

1.1.7 The Need for Visitor Segmentation and Destination Attractiveness

The previous section has already discussed the need to determine the influence of different destination attractiveness dimensions on outcomes such as

affective, holistic and behavioural outcomes. An understanding of the configurations of this relationship may be enhanced if it is viewed according to the familiarity of visitors towards nature-based attractions.

A problem faced by nature-based destinations is that due to the unique properties of these types of destination, it should be noted that not all facilities can be offered at the National Parks. The seasonal effects and inability to view wildlife may also cause the National Parks to be considered unattractive to some. For example, there is an indication based on the results of Tourism Malaysia (2013a) that visitors were not happy with the fact that they are not able to view wildlife. Ability to see wildlife may be beyond the control of the management based on the density of Malaysian forests and the necessity to protect wildlife. Tourists should be aware of this information to align their expectations with what is available. It can be communicated to tourists that the fact that they cannot view wildlife is in line with efforts made to protect wildlife. Furthermore, other activities such as seeing footprints of animals can also be offered as compensation.

Park authorities have also outlined some strategies to protect the environment from being destroyed by mass tourism. These strategies are such as zoning and destination management (Tourism Malaysia, 2013a). Zoning is a strategy where different zoning areas are created to cater to different segments of tourists according to their affinity towards nature. For the destination management strategy, essential activities that cannot be offered in the particular nature destination due to environmental concerns and congestion problems can be offered in other nearby destinations as part of a nature trail package. The above strategies to preserve the environment signals the need to segment nature-based tourists according to their motive for going to the National Parks, which is whether their travel motivations are

strongly driven by nature-related activities and congruent with the main features of the National Parks or vice versa.

Another problem faced by Malaysian National Parks is the competitive environment that they face with other established National Parks such as those in Australia, Thailand and Indonesia as depicted in Section 1.1.5 and Table 1.3 (Tourism Malaysia, 2013a; UNESCO World Heritage Centre, 2019). Tourists who are experienced nature-based travellers, who have been to many of these National Parks would have different expectations as compared to those who are inexperienced. Hence, another research need is to identify experienced and inexperienced segments and their influence on destination attractiveness and outcomes.

The final problem related to visitor segmentation is on the cultural proximity or attraction to Malaysia of the visitors of Malaysian National Parks. Many of the visitors to the National Parks are from European countries. Attracting visitors that are more culturally proximate with Malaysia or domestic tourists would be better as they are more comfortable with the situation and are better able to enjoy the attractions offered by the National Parks. It is also found by Tourism Malaysia (2014) that the visitors who frequent Malaysia, stay longer and also spend more are those with a cultural proximity level that is closer to Malaysian cultures. These visitors are such as those from Asian and the Middle East region. All this also indicates the need to segment tourists according to their cultural proximity levels or attraction towards Malaysia and determine the influence of these segments on destination attractiveness and its outcomes.

1.2 Problem Statement

National Parks encounter many challenges with regards to the fact that nature-based tourism is highly reliant on natural resources with the inability of facilities and attractions to be increased solely based on demand. One of the main challenges faced is mass tourism (Jaafar et al., 2015; Tay & Chan, 2014; Tourism Malaysia, 2013a) and tourism based on seasonal demand (Tourism Malaysia, 2013a). Hence, nature-based tourism destinations face the problem of attempting to navigate between two contradicting goals, one of which is to reduce mass tourism, a factor that can be detrimental to the environment and the other is to increase revenue by attracting high-spending visitors to the destination.

In order to attract high spending visitors, the attractiveness of the National Parks needs to be of a high standard, and whether this can be achieved is a challenge. It is also a challenge for the National Parks to channel attractions to appropriate segments of respondents as tourists will only be willing to pay if the National Park can fulfil their needs. In order to encourage a high-spending market, while facing the obstacle of limited natural attractions at National Parks, steps should be taken to implement appropriate segmentation strategies on tourists.

Currently as described in Section 1.1.4 and depicted in Tables 1.1 and 1.2, frequent tourists to three important National Parks are not mainly from the Asian and Middle Eastern regions, which are the regions where most of the high spending and regular visitors to Malaysia reside in (Tourism Malaysia, 2013a, 2014). This situation creates another obstacle to gaining revenue due to the difficulty of tapping into the high-yield market (Tourism Malaysia, 2013a), as tourists from these places are ones who visit Malaysia regularly, have stronger cultural proximity with Malaysia and consist of people with higher expenditure and longer lengths of stay.

The problem, therefore, is whether the national parks have appropriately positioned themselves and have appropriate segmentation strategies in order to attract these tourists.

Appropriate positioning strategies is also needed given the stiff competition faced by forest-based National Parks and Natural World Heritage sites in Malaysia from countries such as Thailand and Indonesia, as outlined in Section 1.1.5 (Tourism Malaysia, 2013a; UNESCO World Heritage Centre, 2019). In line with the problems of limited resources and a stiff competition faced, National Parks need to face the challenge of identifying important attractions and facilities, improving the performance of these factors and attracting appropriate segments of tourists.

1.3 Research Objectives

The objectives of the research cover two broad categories which are 1) visitor evaluation or perceived destination attractiveness, and 2) visitor segmentation with its influence on the destination attractiveness-outcome relationship. The research objectives are therefore as follows:

- 1) To evaluate the influence of perceived destination attractiveness constructs on the holistic outcome.
- 2) To evaluate the influence of perceived destination attractiveness constructs on the conative outcome.
- 3) To perform an importance-performance evaluation on the destination attractiveness constructs and cognitive indicators .
- 4) To determine whether the affective and holistic constructs mediate the relationship between the cognitive destination attractiveness constructs and the conative outcome.

- 5) To determine the segmentation indicators for travel motivation, familiarity towards nature-based destinations and cultural proximity or attraction towards the host country.
- 6) To evaluate the impact of segmentation such as travel motivation, familiarity towards nature-based destinations and cultural proximity or attraction towards the host country on the destination attractiveness-outcome relationship.

1.4 Research Questions

The research questions related to the influences of destination attractiveness constructs on outcomes are as follows:

- i. Do destination attractiveness constructs such as the core functional construct (cognitive), the supporting functional construct (cognitive), the psychological construct (cognitive), the affective construct and the unique construct influence the holistic outcome?
- ii. Do destination attractiveness constructs such as the core functional construct (cognitive), the supporting functional construct (cognitive), the psychological construct (cognitive), the affective construct and the unique construct influence the conative outcome?
- iii. If the destination attractiveness constructs influence holistic and conative outcomes, is this influence strong or weak?
- iv. If the destination attractiveness constructs influence holistic and conative outcomes, is the cognitive or affective construct more influential in influencing these outcomes. ?